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Meat and Poultry Buying at Farmers Markets: A Survey of Shoppers at Three Markets in Oregon

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Abstract: Farmers markets can be a valuable direct marketing channel. Meat and poultry, relatively new market products, have not achieved widespread success, many vendors reporting low sales and profits. To understand this lack of consumer enthusiasm and acceptance, we surveyed consumers at three Oregon farmers markets using a simple, effective research method (n>1100). Nearly half had never purchased meat or poultry at a farmers market. The main reasons meat and poultry consumers do not buy more or any of these products at farmers markets are price, inconvenience, and food safety. Consumer education recommendations are given to expand sales of these products.

Introduction

Farmers markets can be a valuable direct marketing channel: market shoppers are often willing to pay more than supermarket prices because they value the freshness of the food and the connection with producers (Govindasamy, Italia, & Adelaja, 2002; Hardesty, 2008). Vegetables, fruit, flowers, and value-added products such as baked goods, pickles, and jam dominate U. S. market sales (USDA, 2006). Meat vendors, including those selling both red meat and poultry, have expanded in recent years but typically represent a very small proportion of market sales and are not present at many markets: only 3.2% of all U.S. farmers market vendors sell meat and/or poultry, and these products are sold at 45% of all markets (USDA, 2006). Sales data from the Portland Farmers Market (PSU), one of the largest markets in Oregon, show meat sales (including poultry) as 7.7% of total revenue (Barney & Worth, Inc., 2008).

Consumer surveys have identified an array of factors that influence purchases of "niche" meats like natural beef and pork (Grannis & Thilmany, 2002; Thilmany, Umberger, & Ziehl, 2006) and "local" meats (Maynard, Burdine, & Meyer, 2003), yet these studies do not focus on the challenges of specific market channels, such as farmers markets. Before meat and poultry vendors attempt to expand their farmers market share, it is important for them to know why sales are limited, if that trend can be reversed, and if so, how. To answer these questions, we conducted research on the meat and poultry buying habits of farmers market shoppers; our objectives were to learn the frequency of, and barriers to, such purchases as well as pricing considerations. Our study demonstrates the value of a simple and inexpensive research technique that collects targeted information from a large number of consumers and provides useful and rapid results.

Methods

We conducted Rapid Market Assessment "dot" surveys (described in detail in Lev, Brewer, & Stephenson, 2008; Lev, Stephenson, & Brewer, 2007; Lev & Stephenson, 1999) at three markets in Oregon during July 2009 (Table 1). We asked shopping groups (one or more adults shopping from a single wallet) to answer three multiple-choice questions, each written on a large poster displayed on an easel. All questions were pretested at an initial market (Corvallis) and subsequently modified (Gwin & Lev, 2010). Participants used sticker-dots to select their answers. When participants requested clarification of questions, researchers were available to explain. In addition, we conducted follow-up interviews with some participants (approximately 30 per market, selected opportunistically) to learn more about concerns about buying meat and poultry at markets.

More than 250 shopping groups participated at each market. Based on attendance data, participation was 45% of shopping groups at Montavilla, 14% at McMinnville, and unknown at Ashland, where attendance data were not collected.

Table 1.
Oregon Markets Surveyed

Market	**Day/Time**	**Date of Survey**	**# of Vendors (# meat & poultry)**	**Survey Respondents**
Montavilla (Portland metro)	Sun., 10am-2pm	July 26, 2009	30 (2)	339
Ashland	Tues., 8:30am-1:30pm	July 28, 2009	61 (5)	494
McMinnville	Thurs., 1:30pm-6pm	July 30, 2009	50 (3)	275
Total			141 (10)	1108

We selected markets for a fairly broad geographic scope within Oregon, choosing only those with at least two meat and/or poultry vendors, i.e., where shoppers had options to purchase meat or poultry. Ten of the 141 vendors in the three markets (7.1%) sell meat and/or poultry. If their sales were at the average for other vendors, meat and poultry sales would be 7%. This, with the PSU data, shows the relatively low profile of meat sales in markets and highlights the potential for growth.

Tables 2-4 combine our data and provide responses for both the individual markets and the overall sample. The number of respondents is not the same for all questions because some respondents skipped a question. Because the number of respondents varied per market, we chose to use the percentage of responses for each market to calculate overall sample averages; this prevents the markets with more responses from being over-weighted in the sample.

The results presented here share limitations with more traditional survey research approaches in terms of reliability outside of the selected population. In addition, the visual nature of the "dot" survey approach may add the possibility that early responders influence those who respond later in the market.

Results and Discussion

Question 1: Meat and Poultry Purchase History

Half of all respondents have never purchased any meat or poultry at any farmers market (Table 2). Approximately one quarter (27%) had purchased only meat, slightly fewer (20%) had purchased both meat and poultry, and very few (3%) had purchased only poultry. Research at other farmers markets has shown that, in contrast, nearly all market shoppers purchase fresh produce (Kerr Center, 2001; Govindasamy, Italia, & Adelaja, 2002).

Table 2.
Have You Ever Purchased Meat or Poultry at Any Farmers Market?

Answer	**Ashland**		**Montavilla**		**McMinnville**		**Average**	
	%	N	%	N	%	N	%	N
Neither	46%	229	50%	166	52%	143	49%	538
Meat only	30%	150	29%	98	21%	59	27%	307
Poultry only	4%	18	3%	10	3%	8	3%	36
Both	20%	97	18%	61	24%	65	21%	223
Total	100%	494	100%	335	100%	275	100%	1104
N=1104								

Even this level of meat purchasing is somewhat surprising: conversations with meat and poultry vendors and general observation, by this research team, of shopper activity at these markets and elsewhere suggest a lower percentage of shoppers purchasing meat or poultry. The research team told survey participants repeatedly that ready-to-eat products, such as a cooked sausage sandwich, did not count for this question, but it is possible that some people did not hear, did not understand, or ignored this direction. Whatever the exact percentage, the central conclusion is that many shoppers do not buy meat or poultry at the market.

Question 2: Factors Limiting Meat and Poultry Purchases

The next survey question focused on what limited market purchases of meat and poultry (Table 3). In order to better understand these results, it is useful to separate out three types of respondents: the 19% who do not consume meat and poultry at all, the 13% who "buy lots" at the farmers market, and the 6% who "buy from farmer elsewhere," typically through local retailers and/or purchases of a whole, half, or quarter animal. These three categories, representing 36% of respondents, are either already the core of local meat customers or are not potential customers at all.

In contrast, the remaining 64% are limited by factors that producers can conceivably address to expand sales. The top three reasons cited by this group of respondents were product cost (31%), inconvenience (17%), and food safety concerns (13%). Price was the most common response at all markets, though just barely at McMinnville.

Table 3.
What Most Limits Your Meat and Poultry Purchases at Farmers Markets?

Answer	**Ashland**		**Montavilla**		**McMinnville**		**Average**	
	%	N	%	N	%	N	%	N
Price	31%	149	32%	110	21%	57	28%	316
Don't eat it	21%	100	24%	81	11%	29	19%	210
Inconvenient	16%	78	14%	48	20%	54	17%	180
Buy lots	13%	61	12%	41	17%	45	14%	147
Food safety	8%	38	8%	27	19%	51	12%	116
Can't get cuts I want	5%	23	6%	22	6%	16	6%	61
Buy from farmer elsewhere	6%	30	3%	10	6%	16	5%	56
Total	100%	479	99%	339	100%	268	100%	1086
N=1086; Due to rounding, not all % columns add up to 100%								

In previous Oregon research on purchase limitations for all kinds of products at farmers markets (e.g., Lev & Stephenson, 2002; Brewer, Lev, & Stephenson, 2005), price has never been selected by more than 10% of respondents. Meats appear to be different in two ways. First, farmers market prices are often substantially above supermarket prices for conventional or even "niche" meats. Second, shoppers may be put off by higher absolute differences in prices for meats versus produce: a 100% price premium for a peach may increase the per pound cost from $1 to $2, while the same percentage increase for a steak would mean $10 instead of $5.

Inconvenience was the second most cited limitation for meat and poultry eaters. Shoppers said they were not prepared to buy meat: "If you don't think ahead and bring a cooler with ice, you can't buy it here." They were afraid to carry it around, unrefrigerated, on a hot day, especially if they were not going straight home: "It's not that I think the product is unsafeâ ¦I think it's going to spoil. What happens if I walk around with it on a 90 degree day?"

Food safety concerns, ranked third as a limitation for meat and poultry eaters, reflect a reluctance to buy these products at an open air market. This overlaps with inconvenience but with a different tone. Shoppers expressed skepticism about vendors' refrigeration methods at the market and/or en route. "Were they really careful bringing it here, or did they cut corners?" asked one. "How can they display it without having it go bad?"

Although all meat and poultry vendors keep their products on ice, e.g., in display baskets or coolers, and must follow Oregon Department of Agriculture (ODA) food safety regulations, shoppers are not always convinced. "I'm concerned about handling, temperature control," said one. "How can you do that just with coolers?" Another said she wouldn't buy whole chickens she'd seen that day on ice in an open cooler in the sun: "I don't know if there's any oversight."

Food safety is also a challenge for vendors in product display. Fruit and vegetables are out where shoppers can see, touch, and smell them. Many meat and poultry vendors rely solely on signage to attract customers and pull products from the cooler only on request. As one shopper complained, "the meat is down in a cooler, so I can't see it." Yet, as noted, other shoppers may shy away if meat is displayed.

Question 3: Willingness to Pay

Finally, we examined the price premium, if any, that shoppers would pay for meat and poultry at the market versus "non-local" meat and poultry at the supermarket. Respondents who do not eat meat or poultry were told to skip this question.

Table 4.
If Non-Local Meat & Poultry Costs $4/Lb at the Supermarket, What Would You Pay for Local Meat Here?

Answer	Ashland		Montavilla		McMinnville		Average	
	%	N	%	N	%	N	%	N
No premium	14%	57	6%	18	23%	50	14%	125
$4.50	24%	96	16%	47	21%	46	20%	189
$5.00	38%	156	43%	125	25%	55	35%	336
$5.50	8%	34	18%	52	15%	32	14%	118
$6.00	12%	47	14%	42	12%	27	13%	116
$7.00	3%	11	2%	5	2%	4	2%	20
$8.00	1%	6	2%	5	1%	3	2%	14
Total	100%	407	101%	294	99%	217	100%	918
N=918; Due to rounding, not all % columns add up to 100%								

Eighty-six percent of respondents were willing to pay more for local meat and poultry at a farmers market. However, there was fairly wide variation among markets, from a high of 94% to a low of 77%. Thirty-five percent said they would pay an extra dollar per pound, and 13% would pay two extra dollars per pound, but very few (4%) were willing to pay more. Said another way, two-thirds of respondents were willing to pay at least a 25% premium. This is comparable to other studies, which found a majority of buyers willing to pay a 20% premium for local meats (Maynard, Burdine, & Meyer, 2003; Burdine, Maynard, & Meyer, 2001; Grannis & Thilmany, 2000).

Vendors might be encouraged that such a high percentage of shoppers will pay some premium. However $1 or $2/lb extra may not be enough for vendors to cover costs and make even a minimal profit, given typically more costly production practices (e.g., organic, grass-fed), small volumes, and supply chain challenges (e.g., distances to/cost of processing).

Conclusions and Recommendations

Although still small, "center of the plate" products like meat and poultry have seen some growth at farmers markets over the last decade. We document what many vendors and market managers already know: further expansion of meat and poultry sales at markets will require overcoming multiple challenges, especially pricing constraints, relative inconvenience compared with other market products, and shopper apprehension about the safety of meat and poultry purchased at open air markets, especially on hot days. Few people come prepared to buy these products, e.g., with coolers or cold-packs or a plan to go straight home. Many do not trust that purchases will not spoil on the way home. The consistency of answers across markets in the study reported here suggests similar results might be found in other markets.

The core meat and poultry buying group, while loyal and enthusiastic, is relatively small so far. They also may be purchasing in smaller volumes than the average supermarket consumer. "Meat's like a treat," a shopper explained. "We buy it from a local farmer if we buy it at all." How can this group be expanded?

While price is important for many shoppers, vendors must recognize and appreciate the range of concerns that the study reported here has uncovered. Specifically, food safety and inconvenience, when considered jointly, rank just as highly as price as a constraint on purchases. We suggest four ways to encourage more meat and poultry sales at farmers markets.

- **Use "cowpool" discounts:** Encourage shoppers to buy shares (half, quarter, eighth) of an animal at a discount off the individual cut price, with "how to" guides (e.g., Iowa State University's Beef and Pork Whole Animal Buying Guide, (SMPWG, 2008)) and cost comparisons.

- **Plan to keep it cool:** Teach shoppers to plan ahead and bring a cooler or cold-packs, and/or make the market their last stop. Posters at the market booth/vendor booths could offer guidance for keeping purchases cold. Vendors could offer re-usable, insulated bagsâ with farm logoâ to attract and keep customers.

- **Explain that it's safe:** Provide shoppers with information on the specific practices vendors use to keep meat and poultry cold and safe. Posters could be produced by OSU, in collaboration with ODA's Food Safety division.

- **Meet your meat:** Plan a chef demo featuring the meat and poultry at that market, to teach shoppers appropriate cooking methods, pairing with seasonal produce. Vendors can describe their farms and production practices.

These strategies require resources, both human and financial, and it will take time for shoppers to change long-ingrained buying habits and expectations. Vendors, market managers and staff, market boards of directors, volunteers, and many others have worked hard to make farmers markets in Oregon as successful as they are. By building on those efforts, we can make meat and poultry more popular market fare.

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